

*Ellen  
Tets discuss  
at 3:00*  
*AL*

## **CARLTON** **POSITIONING PAPER**

### **BACKGROUND**

- Carlton has positioned itself as the brand with the "lowest" tar and nicotine for approximately 25 years.
- Carlton has created a specific niche for itself among cigarette brands.
- This positioning has captured an audience 52% of which is aged 50+.
- Awareness of Carlton as the brand considered lowest in tar is 12% among Total Smokers and 25% among Ultra Low Tar Smokers (NOTS: June 1990, 12 mos. ending).

## **TASK AT HAND**

To bolster sales of the Carlton brand through impactful advertising which:

- Appeals more to the younger smoker, ages 21-49.
- Alters the "lowest" message which conveys the perception of being an "extreme" to being a stylish alternative for today's "smart" smokers.
- Communicates a contemporary, upscale image which will appeal to low tar smokers of full-price mainstream brands, currently the source of 45% of Carlton switchers.  
(NOTS: June 1990 - Switched in past three years - July 1987 - June 1990).

**PROPOSED**  
**CARLTON**  
**COPY STRATEGY**

**OBJECTIVE** - To change the perception of Carlton among younger smokers to that of a fashionable brand that is lowest in tar and nicotine.

**STRATEGY** - Convince the target audience that today's fashionable smokers enjoy Carlton and the fact that it is lowest in tar and nicotine.

**SUPPORT** -

- Carlton is the brand for today's smokers
- Carlton has the right taste for a ULT Brand.
- Carlton is the lowest tar/nicotine product available.
- Carlton's lowest tar/nicotine is confirmed by U.S. Government FTC Reports.

**TONE AND MANNER** -

Carlton will be portrayed as a fashionable/young Brand while retaining its unique lowest positioning.

**TARGET AUDIENCE** -

Male and female smokers 21+ years of age.

GENERAL LOW TAR BRANDS  
**SMOKER DEMOGRAPHICS**

	<u>TOTAL</u> <u>SMOKERS</u>	<u>CARLTON</u>		<u>NOW</u>		<u>MERIT ULT</u>	
	%	%	INDEX	%	INDEX	%	INDEX
MALE	52	34	65	33	63	43	83
FEMALE	48	66	<b>138</b>	67	140	57	119
21-29	25	6	24	11	44	19	76
30-34	15	8	53	8	53	23	153
35-49	33	34	103	37	112	36	109
50+	27	52	<b>193</b>	43	159	22	81
HS OR LESS	62	53	85	51	82	42	68
COLLEGE OR +	38	47	124	49	129	58	153
\$ < 20K	29	31	107	22	76	16	55
\$20K - 40K	44	35	80	43	98	44	100
\$40K+	26	38	146	35	135	40	154
HEAVY SMOKER	12	17	142	16	133	13	108
MEDIUM SMOKER	46	45	98	49	107	47	102
LIGHT SMOKER	42	38	90	35	83	40	95
PACK	42	27	64	33	79	45	107
CARTON	50	66	<b>132</b>	61	122	49	98

NATIONAL ONGOING TRACKING STUDY: 12 MONTHS ENDING DECEMBER, 1989

## SOURCE OF SMOKERS

BASE: SWITCHED IN PAST 3 YEARS - JUL 87 - JUN 90

Q.10 SWITCHED WITHIN PAST 3 YEARS TO CURRENT BRAND  
(ACCUMULATED SAMPLE JULY 1987 - JUNE 1990)

	CARLTON	MERIT ULTRA	NOW	VANTAGE ULTRA	WINSTON ULTRA	TRUE	B&H DUL	KENT 111
NWT BASE	262	347	222	129	93	87	92	75
	%	%	%	%	%	%	%	%
	-	-	-	-	-	-	-	-
PREVIOUS BRAND								
NON-FILTER	2	1	1	1	2	1	-	2
FULL PRICE	1	1	1	1	2	1	-	2
PRICE BRAND	1	*	1	-	-	-	-	-
FULL FLAVOR	20	21	14	16	30	30	13	23
NON-MENTHOL (FULL PRICE)	13	17	7	12	26	18	8	20
MENTHOL (FULL PRICE)	6	4	7	4	3	11	5	2
TOTAL PRICE BRANDS	1	-	*	-	1	1	-	1
LOW TAR	46	50	42	50	45	46	52	47
NON-MENTHOL (FULL PRICE)	31	42	26	44	38	31	37	45
MENTHOL (FULL PRICE)	14	7	12	2	4	11	15	2
TOTAL PRICE BRANDS	1	1	4	3	3	3	-	-
ULTRA LOW TAR	16	12	29	18	6	7	10	11
NON-MENTHOL (FULL PRICE)	14	9	22	17	4	3	10	8
MENTHOL (FULL PRICE)	2	3	6	-	2	4	-	2
TOTAL PRICE BRANDS	*	-	*	2	-	-	-	-
TOTAL PRICE BRANDS	4	1	6	5	4	4	-	2
NON-MENTHOL	2	1	5	4	4	3	-	1
MENTHOL	2	*	1	1	-	1	-	1
SWITCHED FROM								
GENERIC/STORE	1	*	*	1	-	-	-	-

Q.6 BRAND CONSIDERED LOWEST IN TAR

BASE : 12 MONTHS ENDING JUNE : JULY 87 - JUNE 90

	TOTAL SMOKERS				NON-FILTER SMOKERS			FULL FLAVOR SMOKERS			LOW TAR SMOKERS			ULTRA LOW TAR SMOKERS		
	TOTL	1988	1989	1990	1988	1989	1990	1988	1989	1990	1988	1989	1990	1988	1989	1990
NWT BASE	13870	2228	5717	5925	111	206	221	742	1969	1981	1051	2718	2733	263	660	671
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
CARLTON	13.1	13.5	13.7	12.3	5.5	3.4	6.7	9.7	10.5	8.3	13.8	14.5	13.3	27.4	26.4	24.9
MERIT (NET)	6.9	6.7	7.6	6.4	6.0	3.4	2.3	6.0	5.9	5.6	7.3	9.0	6.4	8.1	10.0	10.6
MERIT	5.7	5.7	6.3	5.2	6.0	2.8	2.3	5.1	5.2	5.0	6.3	7.6	5.5	5.5	6.7	5.7
MERIT ULTRA	1.2	1.0	1.3	1.2	-	.6	-	.8	.8	.5	.9	1.4	1.0	2.6	3.3	4.9
NOW	5.0	5.8	5.1	4.5	1.7	1.9	2.8	4.1	2.5	2.8	5.4	5.4	4.5	15.1	13.8	11.1
VANTAGE (NET)	4.9	4.3	4.7	5.4	-	2.8	2.2	3.5	3.7	5.0	4.9	5.5	6.1	6.4	4.9	5.5
VANTAGE	3.8	4.2	3.7	3.8	-	2.2	1.7	3.4	3.0	4.2	4.7	4.6	4.2	6.0	2.8	2.2
VANTAGE ULTRA	.8	.1	.9	1.0	-	.6	.5	.1	.7	.4	.2	.8	1.1	.3	2.0	2.7
TRUE	2.9	3.4	3.2	2.5	3.3	1.7	1.3	2.8	3.2	2.1	3.5	3.1	2.8	5.6	3.9	3.7
MARLBORO LTS	3.5	3.0	3.0	4.1	-	.6	1.5	3.2	2.6	4.5	4.1	4.4	5.2	-	.7	.3
KENT (NET)	1.9	2.1	2.1	1.7	2.0	.6	2.8	1.2	1.7	1.7	2.8	2.0	1.4	2.3	3.8	2.8
KENT	1.5	1.8	1.6	1.3	2.0	.6	2.8	1.2	1.4	1.5	2.6	1.8	1.2	.9	1.5	1.4
KENT III	.4	.3	.5	.4	-	-	-	-	.3	.2	.3	.2	.2	1.3	2.3	1.4
SALEM (NET)	3.0	3.7	3.3	2.5	2.0	1.5	1.5	5.1	3.9	3.1	3.6	3.4	2.3	1.1	2.2	1.6
SALEM	1.8	2.0	1.6	1.4	1.0	1.5	1.5	3.5	2.6	2.0	1.5	1.0	1.1	.3	1.3	.7
SALEM LIGHTS	1.4	1.7	1.7	1.1	1.0	-	-	1.6	1.3	1.0	2.1	2.4	1.2	.8	.9	.9

## TOTAL UNITED STATES

1	100	0.01
2	100	0.00
3	100	0.00
4	100	0.01
5	100	0.13
6	100	0.12
7	100	0.00
8	100	0.00
9	100	0.00
10	100	0.00
11	100	0.02
12	100	0.00
13	100	0.09
14	100	0.06
15	100	0.04
16	100	0.29
17	100	0.01
18	100	0.31
19	100	0.10
20	100	0.00
21	100	0.00
22	100	0.00
23	100	0.00
24	100	0.00
25	100	0.00
26	100	0.00
27	100	0.00
28	100	0.00
29	100	0.00
30	100	0.00
31	100	0.00
32	100	0.00
33	100	0.00
34	100	0.00
35	100	0.00
36	100	0.00
37	100	0.00
38	100	0.00
39	100	0.00
40	100	0.00
41	100	0.00
42	100	0.00
43	100	0.00
44	100	0.00
45	100	0.00
46	100	0.00
47	100	0.00
48	100	0.00
49	100	0.00
50	100	0.00
51	100	0.00
52	100	0.00
53	100	0.00
54	100	0.00
55	100	0.00
56	100	0.00
57	100	0.00
58	100	0.00
59	100	0.00
60	100	0.00
61	100	0.00
62	100	0.00
63	100	0.00
64	100	0.00
65	100	0.00
66	100	0.00
67	100	0.00
68	100	0.00
69	100	0.00
70	100	0.00
71	100	0.00
72	100	0.00
73	100	0.00
74	100	0.00
75	100	0.00
76	100	0.00
77	100	0.00
78	100	0.00
79	100	0.00
80	100	0.00
81	100	0.00
82	100	0.00
83	100	0.00
84	100	0.00
85	100	0.00
86	100	0.00
87	100	0.00
88	100	0.00
89	100	0.00
90	100	0.00
91	100	0.00
92	100	0.00
93	100	0.00
94	100	0.00
95	100	0.00
96	100	0.00
97	100	0.00
98	100	0.00
99	100	0.00
100	100	0.00

## TOTAL UNITED STATES

<del>W. J. T. ULT KSF M BOX</del>	0.00
<del>W. J. T. ULT 100</del>	0.07
<del>W. J. T. ULT 100 M BOX</del>	0.00
<del>W. J. T. ULT 100 BOX</del>	0.01
<del>W. J. T. ULT 100 MEN BOX</del>	0.00
<del>W. J. T. ULT 100</del>	0.00
<del>W. J. T. ULT 100</del>	0.00
<del>W. J. T. ULT 100</del>	0.00
<del>W. J. T. ULT 100</del>	0.20
<del>W. J. T. ULT KSF</del>	0.05
<del>W. J. T. ULT KSF MEN</del>	0.00
<del>W. J. T. ULT LT 100</del>	0.15
<del>W. J. T. ULT LT 100 MEN</del>	0.01
<del>W. J. T. ULT 100 MEN</del>	0.03
<del>W. J. T. ULT LT 100 BOX</del>	0.62
<del>W. J. T. ULT LT 100 M BOX</del>	0.44
<del>W. J. T. ULT LT KSF</del>	0.02
<del>W. J. T. ULT LT 100</del>	0.07
<del>W. J. T. ULT LT 100</del>	0.47
<del>W. J. T. ULT LT 100 BOX</del>	0.09
<del>W. J. T. ULT LT KSF BOX</del>	0.00
<del>W. J. T. ULT LT 100</del>	0.01
<del>W. J. T. ULT LT 100</del>	0.02
<del>W. J. T. ULT LT 100</del>	0.00
<del>W. J. T. ULT LT 100</del>	0.01
<del>W. J. T. ULT LT 100</del>	0.01
<del>W. J. T. ULT LT 100</del>	0.00
<del>W. J. T. ULT LT 100</del>	0.00
<del>W. J. T. ULT LT 100</del>	0.22
<del>W. J. T. ULT LT 100</del>	0.23
<del>W. J. T. ULT LT 100</del>	0.14
<del>W. J. T. ULT LT 100</del>	0.14
<del>W. J. T. ULT LT 100</del>	0.00
<del>W. J. T. ULT LT 100</del>	0.00
<del>W. J. T. ULT LT 100</del>	0.24
<del>W. J. T. ULT LT 100</del>	0.00
<del>W. J. T. ULT LT 100</del>	0.00
<del>W. J. T. ULT LT 100</del>	0.00
<del>W. J. T. ULT LT 100</del>	0.00
<del>W. J. T. ULT LT 100</del>	0.00
<del>W. J. T. ULT LT 100</del>	0.24
<del>W. J. T. ULT LT 100</del>	0.13



4 MG - 12 MG STYLES OF CIGARETTES

TOTAL UNITED STATES

06 / 8  
50W 27  
2234HS

TIME	LOCATION	STATUS
0.00	100 BOX	OK
0.01	100 BOX	OK
0.02	100 BOX	OK
0.03	100 BOX	OK
0.04	100 BOX	OK
0.05	100 BOX	OK
0.06	100 BOX	OK
0.07	100 BOX	OK
0.08	100 BOX	OK
0.09	100 BOX	OK
0.10	100 BOX	OK
0.11	100 BOX	OK
0.12	100 BOX	OK
0.13	100 BOX	OK
0.14	100 BOX	OK
0.15	100 BOX	OK
0.16	100 BOX	OK
0.17	100 BOX	OK
0.18	100 BOX	OK
0.19	100 BOX	OK
0.20	100 BOX	OK
0.21	100 BOX	OK
0.22	100 BOX	OK
0.23	100 BOX	OK
0.24	100 BOX	OK
0.25	100 BOX	OK
0.26	100 BOX	OK
0.27	100 BOX	OK
0.28	100 BOX	OK
0.29	100 BOX	OK
0.30	100 BOX	OK
0.31	100 BOX	OK
0.32	100 BOX	OK
0.33	100 BOX	OK
0.34	100 BOX	OK
0.35	100 BOX	OK
0.36	100 BOX	OK
0.37	100 BOX	OK
0.38	100 BOX	OK
0.39	100 BOX	OK
0.40	100 BOX	OK
0.41	100 BOX	OK
0.42	100 BOX	OK
0.43	100 BOX	OK
0.44	100 BOX	OK
0.45	100 BOX	OK
0.46	100 BOX	OK
0.47	100 BOX	OK
0.48	100 BOX	OK
0.49	100 BOX	OK
0.50	100 BOX	OK
0.51	100 BOX	OK
0.52	100 BOX	OK
0.53	100 BOX	OK
0.54	100 BOX	OK
0.55	100 BOX	OK
0.56	100 BOX	OK
0.57	100 BOX	OK
0.58	100 BOX	OK
0.59	100 BOX	OK
0.60	100 BOX	OK
0.61	100 BOX	OK
0.62	100 BOX	OK
0.63	100 BOX	OK
0.64	100 BOX	OK
0.65	100 BOX	OK
0.66	100 BOX	OK
0.67	100 BOX	OK
0.68	100 BOX	OK
0.69	100 BOX	OK
0.70	100 BOX	OK
0.71	100 BOX	OK
0.72	100 BOX	OK
0.73	100 BOX	OK
0.74	100 BOX	OK
0.75	100 BOX	OK
0.76	100 BOX	OK
0.77	100 BOX	OK
0.78	100 BOX	OK
0.79	100 BOX	OK
0.80	100 BOX	OK
0.81	100 BOX	OK
0.82	100 BOX	OK
0.83	100 BOX	OK
0.84	100 BOX	OK
0.85	100 BOX	OK
0.86	100 BOX	OK
0.87	100 BOX	OK
0.88	100 BOX	OK
0.89	100 BOX	OK
0.90	100 BOX	OK
0.91	100 BOX	OK
0.92	100 BOX	OK
0.93	100 BOX	OK
0.94	100 BOX	OK
0.95	100 BOX	OK
0.96	100 BOX	OK
0.97	100 BOX	OK
0.98	100 BOX	OK
0.99	100 BOX	OK
1.00	100 BOX	OK

## 4 MG - 12 MG STYLES OF CIGARETTES

## TOTAL UNITED STATES

	SHARE 12 MOS 8/90
GOLDEN LT 100 BOX	0.01
SPRING LEMON LT 100 M	0.00
TRUE GOLD KSF	0.00
ALPINE LT KSF MEN	0.00
ALPINE LT KSF MEN BOX 100	0.00
ALPINE LT 100 MEN	0.00
HT LT	0.00
NOOT MIND KSF MEN	0.00
B + H LIGHTS 100 BOX (NEW)	0.00
B + H LIGHTS 100 MEN BOX (NEW)	0.00
B + H LT 100	0.47
B + H LT 100 M	0.42
B + H B&M LT 100 BX	0.00
B + H B&M LT 100 MN BX	0.00
B + H BASIC LT 100 BX	0.00
B + H BASIC LT 100 MN BX	0.00
B + H LT	0.00
CHERRY LT	0.00
M + 100 MEN	0.00
M + 100 LT KSF BOX	0.00
M + 100 LT KSF MEN BOX	0.00
M + 100 LT KSF 100 MEN BOX	0.00
M + 100 LT	0.00
M + 100 MEN	0.00
M + 100	0.00
M + 100 MEN	0.00
P + 100 LT	0.17
P + 100	0.02
P + 100 (NEW)	0.00
P + 100 MEN	0.01
P + 100 LT KSF MEN (NEW)	0.00
CHERRY LT	0.34
CHERRY KSF	0.60
CHERRY 100	0.37
M + 100 100	0.05
B + H LT	1.46
B + H LT 100 B	0.47
W + 100	0.17
W + 100 B	1.69
W + 100 B	0.17
W + 100 B	0.08
CHERRY 100	0.00
CHERRY 100	0.03
P + 100	0.00
B + H LT 100 B	0.01

## TOTAL UNITED STATES

[illegible]

4 MG - 12 MG STYLES OF CIGARETTES

TOTAL UNITED STATES

SHARE  
12 MOS  
8/90

<del>CHRYSLER 100-BOX</del>	0.01
<del>CHRYSLER 100-MEN-BOX</del>	0.01
<del>CHRYSLER BOX</del>	0.02
<del>CHRYSLER (KING) KEF-MEN</del>	0.02
<del>CHRYSLER 100</del>	0.06
<del>CHRYSLER KEF-MEN</del>	0.00
<del>CHRYSLER 100-MEN</del>	0.00
<del>CHRYSLER KEF-MEN-PU</del>	0.04
<del>CHRYSLER KEF-MEN-PU</del>	0.03
<del>CHRYSLER 100</del>	0.09
<del>CHRYSLER 100-MEN</del>	0.06
<del>CHRYSLER</del>	0.00
<del>CHRYSLER MEN</del>	0.00
<del>CHRYSLER KEF</del>	0.08
<del>CHRYSLER 100</del>	0.14
<del>CHRYSLER 100</del>	0.05
<del>CHRYSLER 100</del>	0.00
<del>CHRYSLER 100</del>	-0.00
<del>CHRYSLER MEN-BOX</del>	0.01
<del>CHRYSLER 100-KEF</del>	0.00
<del>CHRYSLER EIGHT KEF</del>	0.13
<del>CHRYSLER EIGHT 100</del>	0.17
<del>CHRYSLER</del>	0.00
<del>CHRYSLER (KING)</del>	0.00
<del>CHRYSLER 100</del>	0.00
<del>CHRYSLER 100</del>	0.00
<del>CHRYSLER KEF (50)</del>	0.00
<del>CHRYSLER</del>	0.00
<del>CHRYSLER 100-BOX</del>	0.00
<del>CHRYSLER EIGHTS 100</del>	0.00
<del>CHRYSLER L + M SILENCE KINGS</del>	0.00
<del>CHRYSLER 100 (KING)</del>	0.00
<del>CHRYSLER 100</del>	0.00
<del>CHRYSLER 100-MEN</del>	0.00
<del>CHRYSLER 100</del>	0.00
<del>CHRYSLER 100-MEN</del>	0.00
<del>CHRYSLER KEF-MEN-PU</del>	0.01
<del>CHRYSLER KEF</del>	0.00
<del>CHRYSLER</del>	0.00
<del>CHRYSLER</del>	0.00
<del>CHRYSLER KEF</del>	0.00
<del>CHRYSLER 100</del>	0.00